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New Zealand

Exporter Guide

Annual

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Report Highlights:
New Zealand's imports of consumer-oriented agricultural products have trended upward over the past several years and in 2013 reached US$364 million in comparison to US$124 million in 2006. The United States had a market share of 14% in consumer-oriented products exported to New Zealand. Leading imports of consumer-oriented food products from the United States include lactose, food preparations, pet food, frozen meat, fresh grapes, dry almonds, fresh oranges, bread/pastry products, and raisins.

Post:
Wellington

SECTION I: MARKET OVERVIEW

Overview

New Zealand lies in the southwest Pacific Ocean, consisting of two main islands and several smaller islands. It is comparable in size to Japan and has a population of 4.50 million people (2013). It is a largely urbanized society with over half of the population residing in the four largest cities: Auckland, Wellington, Christchurch and Hamilton. According to Statistics New Zealand, approximately one-third of New Zealanders live in Auckland.

Economic Indicators				
	2010	2011	2012	2013
Population	4.37 million	4.40 million	4.45million	4.50million
Per Capita GDP	31,864	31,978	32,352	33,287
GDP Growth (%)	-0.4%	1.5%	1.9%	2.3%
Unemployment Rate	6.8%	6.3%*	6.8%	5.9%
Consumer Price Inflation	4.0%	1.8%*	0.9%	1.6%
Food Price Inflation	4.2%	2.9%*	-1.0%	1.5%

Source: Stats New Zealand, Reserve Bank of New Zealand and Global Trade Atlas.
**Notes: GDP is a March 31 year using a chain volume series in 1995/96 prices; (*) Year ending Sept/Oct 2011*
Source: Statistics New Zealand

The majority of New Zealanders are of European descent. However, the country has an increasingly multi-cultural population.

New Zealand is highly dependent on the primary sector with agricultural products accounting for approximately 55% of total exports. The figure increases to 65% when forestry and seafood are included. An estimated 80-90% of New Zealand's primary production is exported.

US and New Zealand: Bilateral Total Agricultural Exports (US Dollars)						
	2008	2009	2010	2011	2012	2013
US Exports to NZ	$233,229,268	$220,554,302	$252,427,957	$298,212,814	$385,289,279	$424,362,890
NZ Exports to US	$1,833,228,538	$1,561,087,052	$1,671,622,871	$2,008,247,437	$2,243,787,484	$2,151,942,388

Source: Year ending December, Global Trade Atlas

China is New Zealand's top destination for agricultural, forestry and fishery exports followed by United States and Australia. Leading exports include beef meat, dairy products (milk protein concentrate, casein, and caseinates), wine, sheepmeat, lumber, fresh apples, and kiwifruit. By contrast, New Zealand ranks as the 46th largest market for U.S. agricultural exports. Leading U.S.

agricultural exports to the New Zealand market include lactose products, food preparations, pet food, frozen pork, dry almonds, animal feed, fresh grapes, fresh oranges, whey and milk products, nuts, citrus fruits and stone fruit.

New Zealand is the second largest market for U.S. lactose products, sixth largest market for U.S. pet food, the seventh largest for USA fresh fruits (peaches, plums and nectarines) and the 10th largest market for fresh oranges.

Consumer-Oriented Food Product Trade

As shown in the graph below, New Zealand's imports of consumer-oriented agricultural products have trended upward over the past several years. In 2013, U.S. exports of consumer-oriented food products to New Zealand reached US$364 million in comparison to US$130 million in 2006. Australia is the leading supplier of consumer-oriented food products with a 39% market share, followed by the United States at 15% and China at 4%.

Leading consumer-oriented imports from Australia include, food preparations (including food crystals, powders, nut pastes etc.), bread/pastry products, wine, cocoa products, cereal, non-alcoholic beverages, sugar confectionery, cat and dog food etc. Leading imports from the United States include lactose, food preparations, dog and cat food, frozen meat, fresh grapes, dry almonds, fresh oranges, bread/pastry products, raisins etc. Top imports from China include sugar confectionery products, bread/pastry products, peanuts, frozen vegetables, apple juice, cookies, pasta, sauces, fresh garlic etc. *(Source: Global Trade Atlas)*

Source: Global Trade Atlas

Advantages and Challenges for U.S. Consumer Food Exporters

<table>
<tr><th>Advantages</th><th>Challenges</th></tr>
<tr><td>Familiar business and cultural environment and no language barriers</td><td>New Zealand labeling laws are different from those in the U.S.</td></tr>
<tr><td>U.S. products tend to enjoy a quality reputation along with novelty status</td><td>Growing competition from Malaysia and China in the consumer-oriented food category</td></tr>
<tr><td>Minimum barriers to trade including low tariffs ranging between 0 and 5%</td><td>Strict phytosanitary/sanitary regulations with regard to fresh produce and meats</td></tr>
<tr><td>Opportunities to market U.S. fresh products during New Zealand’s off-season due to the counter seasonal nature of the markets</td><td rowspan="2">Consumer foods imported from Australia are duty free, while U.S. products are assessed tariffs between 0 and 5%. Some Canadian products have preferential tariff treatment.</td></tr>
<tr><td>Some supermarkets make individual buying decisions</td></tr>
<tr><td>Ease of doing business and size of market make it a good fit for new-to-export and small to medium companies</td><td>New Zealand retail market is highly consolidated and dominated by two supermarket chains</td></tr>
<tr><td>NZ practices a science-based approach to trade</td><td>Distance from United States results in high transportation costs</td></tr>
</table>

SECTION II: EXPORTER BUSINESS TIPS

- New Zealand is a well-developed market. Establishing good working relationships with importers/distributors is key to entering the New Zealand marketplace. Approximately 90% of all imported food products are purchased and distributed within New Zealand by importers/distributors.
- New Zealand supermarkets mainly purchase imported products from importers and distributors rather than importing directly. In the case of Foodstuffs, interested U.S. exporters should contact each of the regional offices directly as they can make buying decisions independently of each other. (Please see Section V for contact information.)
- Tariffs assessed on U.S. food products range from zero to 5%. Tariff rates can be checked at on the New Zealand Customs website. New Zealand Working Tariff Document
- General sales tax (GST) on domestic and imported products is 15%.
- The cost of international freight can be a fairly significant percentage of the final cost of a product. U.S. exporters can contact freight forwarders in the United States to determine transportation cost. New Zealand importers and distributors can arrange shipment with the help of customs brokers in New Zealand.
- For complete guide on import duties and charges, please check this link New Zealand Customs duties and charges
- High quality products with innovative packaging and unique features that are price competitive tend to do well in the New Zealand market.
- Fresh U.S. produce is an especially welcome addition to New Zealand retail shelves during winter in the Southern Hemisphere.
- Innovative, environmentally-friendly packaging has an advantage in retail food products.
- New Zealand has strict food standards and labeling requirements that are set out in the Australia New Zealand Food Standards Code. U.S. exporters are encouraged to review the Food and Agriculture Import Regulations and Standards (FAIRS) report for New Zealand which contains detailed information on New Zealand's food standards, labeling requirements, import regulations, etc. This report can be viewed at the following site: http://www.fas.usda.gov/scriptsw/attacherep/default.htm

SECTION III: MARKET STRUCTURE AND TRENDS

Retail Grocery Sector

The retail grocery market in New Zealand is well-developed with supermarkets, small-scale grocery stores, fresh food specialty stores and convenience stores in all of the major population centers. New Zealand's food expenditures in 2013 were valued at over NZ$25 billion (US$19.7 billion) and include expenditures in supermarkets, convenience stores.

Two supermarket chains, Foodstuffs (NZ) Limited and Progressive Enterprises Limited, dominate the New Zealand retail sector. Foodstuffs (NZ) Ltd. has an estimated 55% share of the New Zealand grocery market and Progressive Enterprises has an estimated 43% share.

New Zealand Retail Market Distribution

Supermarket Group	Ownership	Market Share	Store Names
Foodstuffs (NZ) Ltd	New Zealand owned; made up of three independently owned co-operatives	55%	• New World- Full service supermarkets • Pak'n'Save- Foodbarn/retail food warehouses • Write Price- Foodbarn/retail food warehouses • Four Square- Convenience grocery stores • On the Spot- Convenience stores
Progressive Enterprises	Owned by Woolsworths Limited (Australia)	43%	• Woolworth- Full service supermarkets • Woolworth Quick & Micro- Convenience stores
Independent Grocery Stores	New Zealand Owned	2%	• Ethnic Shops • Asian Grocery stores • Independent Green Grocers

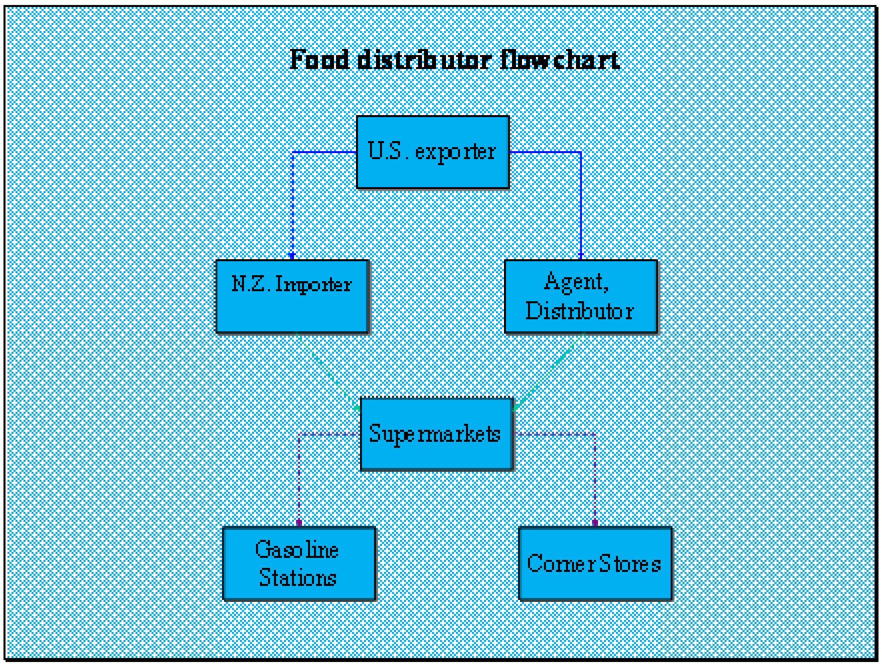
Source: Coriolis Research, June 2010

Foodstuffs (NZ) Limited has 722 stores including 139 New World, 50 Pak N Save, 282 Four Square, 147 On the Spot, 3 Write Price, 2 Shoprite, 78 Liquorland 3 Raeward Fresh Food, 18 Henry's Beer and Wine stores. The organization is comprised of cooperatives: Foodstuffs North Island Ltd, and Foodstuffs South Island Limited. Interested U.S. exporters should contact each of the regional Foodstuffs offices as they make some buying decisions independently of each other. (Please see Section V for contact information.)

Progressive Enterprises Limited, a subsidiary of the Australian company Woolworths Limited, has a 46% share of the New Zealand grocery market. Progressive Enterprises has, 171 Countdown, and 22 Woolworths Micro and Quickstop convenience stores.

U.S. exporters interested in supplying the New Zealand market can work with importers, distributors or import brokers that target food category/merchandise managers at major wholesalers and supermarket chains. Indicative margins (as a guide only) for New Zealand importers/distributors are as follows:

-Importers: 5-20% of gross margin (i.e. percent of wholesale value)
-Distributors: 10-30% of gross margin (if funding promotional activities)
10-20% of gross margin (if not funding promotional activities)
-Supermarkets: 15-20% of the wholesale value (depending on the category)
-Independent Grocers: 30-40% of the gross margin



Market Trends

- In New Zealand, obesity rates are steadily rising. Between 1997 and 2007, the New Zealand adult obesity rate rose from 19% to 26.5%. However, at the same time the total amount of sugars consumed in New Zealand dropped from 114 grams per day to 107 grams per day, indicating that New Zealand appears to be embracing a balanced low sugar, low-carb lifestyle. *(Supermarket News, 2014*)
- A recent AC Nielsen research survey taken during a 30-day period in December 2014 has listed the following Top 10 favorite snacking habits in New Zealand (*FMCG Dec 2014)*:
    - Fresh Fruit – 69%
    - Chocolate – 67%
    - Potato Chips/Tortilla Chips – 62%
    - Cookies – 61%
    - Bread/Sandwich – 56%
    - Cheese – 56%
    - Crackers – 50%
    - Nuts/Seeds – 46%
    - Vegetable – 44%
    - Yogurt – 42%

The research shows a massive untapped opportunity to gain market share in the nutritious, ready-to-go easy-to-eat snacks and meal alternatives.

- The same survey also revealed that 28% of New Zealanders prefer snack foods that are low in sugar or are sugar-free; 26% prefer natural flavors, 26% will opt for GMO free snacks and 25% prefer their snackfoods to be free from artificial colors and flavors *(FMCG Dec 2014)*
- The following are food store trends that are gaining popularity in New Zealand (FMCG)
  - Barn style retailing – New Zealand supermarket chains, particularly the PakN- Sav chain, has a unique format of 'pile them high'. Shoppers in this store are not necessarily looking for a huge amount of choice, but rather are seeking out the products and brands they are familiar with at lowest possible price.
  - Clear retailer identities – While both New Zealand and Australian supermarkets have a duopoly structure, there seems to be greater emphasis on differentiation in New Zealand, in an attempt to target shopper preferences. This is illustrated by the clear difference between retailers who target bulk supermarket shoppers (Pan N Save stores); versus retailers such as New World Metro and Countdown, which cater to the shopper who makes more frequent trips to the store and who tends to purchase smaller quantities on each visit.
  - Clean Store policies – Providing shoppers with an experience that appeals to the senses through in-store theatre, use of sensory elements, etc helps to dial up the emotional response and encourages them to become more emotionally involved in the decision.
  - Cross category merchandising – cross category merchandising and bundling (e.g. placing displays of meat seasonings and sauces within the meat department) encourages greater consumer purchase trials.

- A Coriolis research report from November 2012, identified some emerging trends in consumption growth and consumer food product demand in New Zealand, providing an indicator of those U.S. food and beverage product exports which have the strongest prospects in the New Zealand market.. These products include:

  - Best – Salmon, Honey, Spirits, Cookies, Pet food, Cherries
  - Better – Chocolate, Frozen French fries, Beer, Alcoholic cider, Avocados, Berries
  - Good - Jams & jellies, Capsicum, Peas, frozen & dried, Sugar confectionery, Soups & broths, Fresh onions, Prepared fish, Beef jerky

  Some of these products are already exported from the U.S. to New Zealand. This report can be seen at http://www.med.govt.nz/sectors-industries/food-beverage/pdf-docs-library/information-project/coriolis-report-investors-guide.pdf

- According to a Nielsen online retail report from late 2013, approximately 45% of the 1.8 million estimated online shoppers in New Zealand researched merchandise through their smartphones. Of this total, 29% made actual purchases through their smartphone devices. *(FMCG, Aug 2013)*
- New Zealand is the sixth largest market for U.S. pet food. In 2013 total dog food sales in New Zealand were estimated to be NZ$123 million, Dry dog food sales totaled NZ$56 million, wet dog food accounted for sales of NZ$47 million, and canned dog food sales were NZ$17 million. The cat food market accounted for NZ$197 million, including dry cat food sales of NZ$79 million, canned cat food sales of NZ$63 million, and pouch cat food sales of NZ$35 million)

SECTION IV: BEST CONSUMER ORIENTED PRODUCT PROSPECTS FOR US EXPORTERS

Product Category	**Total Imports from world 2013 (US $'000)**	**5 Year Average Annual Import Growth**	**Import Tariff Rate**	**Key Constraints over Market Development**	**Market Attractiveness for U.S.**
Fresh Grapes	$33,418	10.30%	Free	NZ is a small market; competition from Chilean and Australian grapes.	High growth potential. Consumers want fruits to be available year round.
Fresh Fruits ***(apricots, cherries, peaches, plums)***	$2,287	-16.95%	Free	Some consumers have a slightly negative quality perception of imported fresh fruits.	U.S. can supply counter-seasonal fruit. Consumers want fruits to be available year round.
Pears	$4,681	n/a	Free	Consumer resistance to unfamiliar varieties.	NZ is one of the first markets to get the fresh pear crop.
Citrus Fruit	$24,490	5.41%	Free	Small market	New Zealand consumers appreciate quality of U.S. citrus.
Fruit and vegetable Juice	$36,499	-8.04%	0-5%	U.S. products are expensive compared to products from some competitor countries.	Value-added juices/ concentrates with health and nutritional benefits have potential to grow.
Processed Fruits & Vegetables	$240,864	2.16%	0-5%	U.S. products are not always price competitive with product from China and other competitors.	U.S. has a reputation of supplying good quality product. To be successful, product must be price competitive.
Dry Fruit ***(dates, figs, raisins)***	$27,317	3.34%	Free	U.S. is price competitive in raisins; faces tough competition in dates/figs category.	Expanding demand for good quality and healthy foods.
Dry Nuts ***(almonds/ walnuts/pistachios)***	$64,482	16.24%	Free	Competition from Australia and other countries; need to be price competitive to maintain market share.	U.S. dry nuts are considered high quality. Market share can be expanded if price competitive and promoted as healthy and nutritional snack food.
Snack food ***(confectionery, cocoa product, cookies)***	$286,297	6.52%	0-5%	Australia is a leading supplier. Australia and New Zealand enjoy similar tastes/flavors in snack items.	Strong demand for convenience and snack food.
Breakfast Cereal	$60,208	7.78%	Free	Strong competition from Australia.	Strong demand.
Pet Food	$93,579	6.95%	0-5%	Price competitive products from Australia.	Strong demand for premium products.
Wine and Beer	$175,629	3.16%	5%	Lack of importers handling U.S. wines	American style Zinfandel and Cabernet Sauvignon have potential to expand

					in this market.

SECTION V: KEY C

ONTACTS

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APPENDIX 1. STATISTICS

Table A. Key Trade and Demographic Information

Agricultural Imports from All Countries US$ millions (2013) U.S. Market Share	 $3,864 11%
Consumer Food Imports from All Countries US$ millions (2013) U.S. Market Share (%)	 $2,456 15%
Edible Fishery Imports from All Countries US$ millions (2013) U.S Market Share (%)	 $143 5%
Total Population (Millions) (Dec 2014) Annual Growth Rate (June 2013)	4.5million 0.85%
Urban Population (Millions) (2013)	3.5
Number of Major Metropolitan Areas[1]	1
Per Capita Gross Domestic Product (US$/2013)	$33,237 (NZ$26,258)
Unemployment Rate (%) (Dec 2014)	5.4%
Percent of Female Population Employed (Sept 2013)	47%
Exchange Rate (Nov 2014)	US$1 = NZ$1.28

Source: Statistics New Zealand

1/ There is only one city in NZ with a population in excel of one million – Auckland with a population of 1.46million. New Zealand has three other large metropolitan areas (June 2010- *latest available*): Wellington region (483,200), Christchurch region (565,800), and Hamilton region (411,500).

Table B. and C New Zealand Consumer-Oriented Food Product Imports and New Zealand Fish & Seafood Product Imports to New Zealand

CONSUMER-ORIENTED AGRICULTURAL IMPORTS ($000)	2011	2012	2013
Australia	964,548	1,008,349	962,265
United States	250,713	329,284	363,612
China	97,730	102,693	104,766
Singapore	65,155	88,888	97,228
Netherlands	58,063	67,138	69,817
Thailand	58,725	60,232	67,531
France	40,671	56,070	61,056
Philippines	52,249	58,140	55,204
Canada	56,377	53,729	51,647
Germany	41,347	53,398	46,865
Denmark	28,079	31,390	42,516
Italy	35,665	34,742	36,126
Indonesia	20,751	23,662	33,351
United Kingdom	25,348	27,896	30,812
Finland	19,545	21,662	28,464
Other	372,441	361,860	405,019
World	**2,187,407**	**2,379,133**	**2,456,278**

FISH & SEAFOOD PRODUCTS IMPORTS ($000)	2011	2012	2013
Thailand	45,667	54,901	48,405
China	25,718	22,298	25,134
Vietnam	13,169	12,493	17,640
New Zealand	3,379	3,805	12,667
Australia	16,483	11,699	7,838
United States	5,865	5,128	7,211
Canada	6,414	8,970	5,553
Malaysia	2,835	2,617	2,516
Japan	1,307	1,371	1,909
Fiji	1,704	1,745	1,745
India	1,219	1,706	1,650
Korea South	1,149	1,779	1,614
Philippines	650	723	1,419
Peru	956	309	948
Argentina	1,882	1,704	860
Other	8,999	5,314	5,539
World	**137,398**	**136,562**	**142,648**

Source: Global Trade Atlas

Table D. New Zealand Imports of Agriculture, Fish & Forestry Products

New Zealand Imports (Millions of U.S. Dollars)	Imports from the World			Imports from the U.S.			U.S Market Share		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
CONSUMER-ORIENTED AGRICULTURAL TOTAL	2,187	2,379	2,456	250	329	364	12	14	15
Snack Foods (Excl. Nuts)	296	299	286	5	7	8	2	2	3
Breakfast Cereals & Pancake Mix	52	61	60	0	0	1	1	1	1
Red Meats, Fresh/Chilled/Frozen	127	127	158	19	23	22	15	18	14
Red Meats, Prepared/Preserved	31	35	35	4	3	4	12	9	11
Dairy Products (Excl. Cheese)	81	125	141	22	38	46	48	37	26
Cheese	32	32	34	4	6	5	13	17	16
Eggs & Products	2	2	5	0	1	2	28	26	47
Fresh Fruit	128	140	148	33	37	35	26	27	24
Fresh Vegetables	22	14	15	2	1	1	8	5	7
Processed Fruit & Vegetables	238	245	241	31	34	38	13	14	16
Fruit & Vegetable Juices	46	42	36	4	5	3	10	11	8
Tree Nuts	54	57	64	9	15	18	16	26	29
Wine & Beer	153	165	176	1	2	2	1	1	1
Nursery Products & Cut Flowers	7	7	7	0	0	0	5	5	4
Pet Foods (Dog & Cat Food)	87	86	94	25	28	34	28	32	37
Other Consumer-Oriented Products	831	942	255	91	130	143	11	14	15
FISH & SEAFOOD PRODUCTS	137	137	143	6	5	7	4	4	5
Salmon	7	8	7	2	1	3	24	17	41
Crustaceans	39	41	47	0	0	0	0	0	0
Groundfish & Flatfish	1	2	1	0	0	0	2	0	0
Molluscs	13	13	13	1	1	1	5	5	8
Other Fishery Products	77	72	75	4	3	3	5	4	4
AGRICULTURAL PRODUCTS TOTAL	3,500	3,676	3,864	298	385	424	9	10	11
AGRICULTURAL, FISH & FORESTRY TOTAL	3,772	3,968	4,181	313	401	443	8	10	11

Source: Global Trade Atlas

APPENDIX 2: DOMESTIC TRADE SHOWS

There are three major domestic Food Trade Shows in New Zealand:

Fine Food Show (New Zealand –June 26-28, 2016, Auckland

The Fine Food New Zealand show was first organized in 2010. It followed the same format as Fine Food Australia, which has been running successfully for many years in the annually alternating locations of Sydney and Melbourne. Fine Food is an international event and attracts companies from Europe, Australia, Asia and New Zealand. This show focuses on food and beverage, as well as hospitality products. This show is a trade-only event, and all visitors from the food industry are invited to the show.

For more information please contact the Foreign Agricultural Service office at the U.S. Embassy in Wellington:

Foreign Agricultural Service
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You may also contact the show organizers directly at:

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Katrina Gordon Show (major metropolitan centers)

This local food show takes place in 16 major cities of New Zealand, including Auckland, Wellington, Christchurch and Queenstown in different months throughout the year. For more information, contact:

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